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## **The Netherlands**

### **Market Development Reports**

#### **Private Labels in the Netherlands**

**2000**

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#### **Report Highlights:**

**The private label market in the Netherlands show significant signs of growth in the future. Many shoppers would like to see a wider variety of private label products, especially in the most popular ranges, and would be supportive of their supermarket chain taking a lead in bringing out new products and offering more value for money.**

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## BACKGROUND TO THE REGION

### European Union

Growing from six Member States in 1952 to 15 by 1995, the European Union today represents more than 370 million consumers from the Arctic Circle to Portugal, from Ireland to Crete. Though rich in diversity, the Member States share certain common values. The Member States are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Luxembourg, Italy, Portugal, Spain, Sweden, the Netherlands and the United Kingdom.

A major objective of the European Union is to create a single market. Harmonization of legislation is an important component of the single market. The legislation is made up of regulations and directives. Regulations must be implemented by each Member State while directives must be incorporated into each member state's own national legislation. The harmonization of food legislation is not yet completed and this means that exporters to Europe always have to check their product formulation and labeling for compliance with national legislation in the member state to which they export to. Also, exporters to Europe, should be aware that despite the cooperation within the European Union, the member countries remain very different, concerning business etiquette, culture, tastes, preferences and language.

### Benelux

Belgium, the Netherlands and Luxembourg situated in the northwestern part of Europe. All three countries are member states of the European Union. In addition they cooperate in a number of matters, standardizing certain regulations as the Benelux. The Benelux preceded the European Community which was founded in 1957. The name Benelux is nowadays also often used as a geographic indication. The cooperation between Belgium and Luxembourg is even greater because these two countries have a monetary union. All three countries are monarchies with a parliamentary democracy. Belgium is a federation consisting of three parts: Flanders (Dutch speaking), Wallonia (French speaking) and the Brussels region. The countries have a legal system of their own which is partly harmonized within the regulations of the European Union.

Until the introduction of the Euro on January 1<sup>st</sup>, 2002 the new European Union currency until that time the Benelux countries will use their own currencies: the Dutch Guilder, the Belgian Franc and the Luxembourg Franc. In this market brief the values as of August 1<sup>st</sup>, 2000 are used: 1 Dfl = 0.4194 US\$ and 1 Bfr / 1 Lfr = 0.0229 US\$; 1 Dfl = 0.4537 EURO and 1 Bfr / 1 Lfr = 0.0248 EURO.

Europeans speak many different languages. The people in the Netherlands speak Dutch. Many people in the Netherlands also speak one or more other languages, e.g., English, German or French. Belgium has formally three official languages: In the North and West of the country (this part is called Flanders) Flemish is the mother tongue, a Dutch dialect. In the south and east people speak French. In the east there is a small part of the country where German is the official language. The Luxembourg population speaks a dialect which is a mixture of the two official languages in this small country: French and German. The Benelux is no homogeneous block, especially concerning "cuisine" buying patterns, etc. Success in the Netherlands is no guarantee for success in Belgium/Luxembourg, and vice versa.

## KEY FIGURES OF THE NETHERLANDS

### Demographic Characteristics

The population of the Netherlands is 15.8 million inhabitants. It is one of the most densely populated countries in the world, with 468 people per square kilometer. More than half of the population lives in the triangle Rotterdam-Amsterdam-Utrecht. The most important demographic trends in the Netherlands are:

- Population is growing steadily (16.6 million expected in 2010)
- Average household size is declining (37 percent one person households in 2010)
- Percentage of people with high education levels (university/technical college) is growing (from 11 percent in 1991 to 15 percent in 1998)
- More elderly people (15 percent of the population will be older than 65 in 2010)

### Economic Development

The Dutch economy is in its sixth year of expansion, combining strong GNP growth, with sharply falling unemployment and modest inflation. The economy expanded by 3.6 percent in 1999. Economic growth in 1999 was driven predominantly by investment and consumer spending, buoyed by sizable income gains resulting from a boom in asset prices. With job growth largely outpacing an expansion of the labor force, unemployment in 1999 fell to less than 3 percent of the labor force. A level last seen in the early 1970s. Consumer price inflation remained modest as the effects of higher crude oil prices and depreciation of the EURO lifted the CPI in 1999, slightly more than 2 percent.

Economic Development					
	1997	1998	1999	2000	2001
Gross domestic production (%)	3.80	3.70	3.60	4.00	3.50
Unemployment (%)	6.20	4.90	4.00	3.25	2.75
Consumer price inflation (%)	2.20	2.00	2.20	2.25	3.25
Average buying power (%)	0.30	1.40	-0.40	1.00	5.25
Total private consumption (%)	2.60	4.10	4.20	3.75	4.25
Private consumption of food and beverages (%)	2.00	0.20	0.00	0.50	0.50

Source: Centraal Planbureau, 2000

Due to predictions of strong world trade growth, the official forecast is for the Dutch economy to expand by 4 percent in 2000 followed by 3.5 percent GNP growth in 2001. A tight labor market is expected to result in a fall of unemployment to 2 percent. Consumer price inflation, on the other hand, is expected to rise to 2.25 percent in 2000, and 3.25 percent in 2001. Average buying power will grow 1 percent in 2000. Adoption of a new tax system in the Netherlands in 2001 will likely result in a 5.25 percent increase of average buying power. In 2000, total private consumption is expected to grow by 3.74 percent. The strong increase in private consumption especially deals with the purchase of consumer durables, like cars and domestic appliances. Of total private consumption, 15 percent (US\$ 24.5 billion) was spent on food and beverages in 1998. In 1999, total sales in food and beverages stuck at the 1999 level. However, a growth of 0.5 percent is foreseen for 2000 and 2001. In 1999 Dutch households

spent US\$ 68.8 on food per week, of which US\$ 54.5 was spent in supermarkets. As a result of changing demographics and increased wealth, Dutch eating habits are changing with consumers demanding convenience, fresh foods, more variety, and more specialty food items. Health and convenience foods are increasingly valued by the customer. In addition to low prices, the Dutch consumer wants quality, a wide variety, and service.

Trends in the Dutch Food Market	
•	Health: natural ingredients - low calories - no sugar - fresh - organic
•	Convenience: frozen foods - fresh, prepacked - take-away - easy to prepare
•	Price: special offers - shop-around
•	Winners: fish - meals - bread - pastry - petfood
•	Distribution: more power to the supermarket - fewer specialty stores - more shopping at the gas and railway station
•	Stores: more personal service - wider assortment - more fresh and non-food - convenience foods - more exotic products - environmental friendly products

## Dutch Retail Structure

The Netherlands has a high number of Supermarkets with relatively small floor space. There are only a few hypermarkets or superstores. Large supermarkets have 65 percent of the market, specialty stores have a market share of more than 20 percent, and open air markets, department stores, gas station stores, etc., make up the balance. Specialty stores, like butchers, greengrocers, etc., are continuously losing market shares to supermarkets because of their lack of economies of scale.

Because consumers prefer one stop shopping, supermarkets expand their services and assortments with products as crockery, textile, books and services such as photo development and shoe repair. In 1999, the turnover of these articles and services was already US\$ 671.1 million. A rapid increase in the near future is expected. In 1999 the total turnover of supermarkets was US\$ 19.9 billion. This is an increase of 5.6 percent, compared to US\$ 18.8 billion in 1998.

The Dutch supermarket sector is dominated by Albert Heijn with a market share of 27.8 percent. Six major “buying groups” control 98.8 percent of the market. These buying groups sell to supermarket chains directly, or indirectly by selling to their wholesalers. Members of these buying groups retain some decision making authority. It is expected that in 10 years the majority of Dutch food will be bought by centralized buying offices of large retailers or by buying offices of cooperating smaller retailers throughout Europe. As an example, Albert Heijn belongs to the Swiss-based AMS (Associated Marketing Services AG). This buying association buys for 12 different European supermarket companies, with a total of 14,000 stores in 12 countries. In 1996 AMS, bought over US\$ 96 billion of food products which were sold in the 14,000 stores under private label “Euroshopper.” AMS is just one of the 12 European buying associations for supermarkets, although it is one of the largest.

<b>The Six Largest Food Buying Organizations in the Netherlands in 2000</b>			
<b>Retailer/Wholesaler - type of outlet</b>	<b>Sales/ Market share</b>	<b>Number of Outlets</b>	<b>Purchasing</b>
<b>Albert Heijn</b> , Retailer, National Multiple	US\$ 5.5 billion 27.8 percent	1,790 nation wide	Direct, Imp./ wholesaler
<b>Laurus Group</b> , Buying organization for supermarket chains Super De Boer, Edah, Konmar, Spar, Groenwoudt Supermarkten and Basismarkt	US\$ 4.7 billion 23.8 percent	1,908 nation wide	Direct, Imp./ wholesaler
<b>Trade Service Nederland</b> , (TSN) Buying organization for wholesalers Schuitema, Sperwer, A&P, Prisma Food Groep, Boon Sliedrecht and Codis	US\$ 4.2 billion 21.0 percent	1,730 nation wide and regional	Direct, Imp./ wholesaler
<b>Superunie</b> , Buying organization for 14, usually family owned, regional supermarket chains	US\$ 3.5 billion 17.8 percent	1,240 regional	Direct, Imp./ wholesaler
<b>Aldi</b> , Retailer	US\$ 1.3 billion 6.3 percent	359 nation wide	Direct, Imp./ wholesaler
<b>Koopconsult</b> , Buying organization for the regional wholesaler Samenwerkende Dirk van den Broek Bedrijven	US\$ 0.4 billion 2.1 percent	173 regional	Direct, Imp./ wholesaler
<b>IN TOTAL</b>	<b>US\$ 19.6 billion 98.8 percent</b>	<b>7,200</b>	<b>Direct, Imp./ wholesaler</b>

Source: Elsevier Bedrijfsinformatie, 2000

## DEVELOPMENT OF PRIVATE LABEL

### Private Label in Europe

Europe is still by far the most important continent for private label, both in terms of volume and value. Store brands are a way of life in Europe where they have eroded away at the market share of respected brands. However, sales of private labels differ strongly when the continent is divided into regions. Europe's most important region in terms of private label is Western Europe. With a turnover of US\$ 232.4 billion, Western Europe accounted for more than 83 percent of all private label sales in Europe in 1998. Within Western Europe the United Kingdom, led by such dominant food retailers as Tesco and Sainsbury which have invested heavily in private label use over the years, is leading the way. The high level of competition between the grocery multiples and the high penetration of non-food private label retailers such as Marks & Spencer and Boots are responsible for the accelerated growth.

With up to 20 percent or more in some categories, private labels have become more than just a low-priced alternative for Name brands. In fact, they have included more and more into value added products. They are sign of quality which gives extra profile to the supermarket formula. This success has come a long way. It took private labels more than 20 years to find their current place in the market. Nowadays European supermarkets target different segments of their customer base with differentiated private label products to help maintain customer loyalty. The most premium items usually bear the name of the store. Specialties that target local or regional tastes comprise another segment. Economy lines like "Euroshopper" often cut several European

countries, offering a budget line for good value.

Common consumer attitudes toward private label products in Europe are:

- Younger age groups are more likely to buy private label products; will buy a large number of private label products in the future; are more aware of private label products; are less likely to buy manufacturers' brands; and are more likely to consider some private label offerings to be better than others
- Shoppers would like retailers to take a leading role in private label products
- Shoppers would like to see a wider variety of private label products particularly in bottled, jarred, canned or tinned products and dairy products
- Two fifths of consumers recognize that some supermarket chains have better private label products than others in terms of quality, taste, freshness and overall value for money
- Quality, taste, freshness and overall value for money are the most important factors to the private label shopper
- While the majority of consumers are satisfied with current manufacturers' brands, some weaknesses in specific product areas are identified in bottled, jarred, canned or tinned products and dairy products

In general, private labels are strongest in those categories to which the consumer attaches the least emotional value. The average price of a private label is approximately 30 percent lower than a comparable Name brand. In Germany, Belgium and Austria private labels are comparably the cheapest, approximately 40 percent lower than the price of the Name brands. In Germany for example discounters like Aldi and Lidl have strong market positions.

<b>Private Label Market Share by Country (%)</b>						
	Volume			Value		
	1998	1999	Diff.	1998	1999	Diff.
United Kingdom	45.2	45.4	0.2	43.6	43.5	-0.1
Belgium	34.8	34.7	-0.1	25.9	26.0	0.1
Germany	31.6	33.2	1.6	26.1	27.4	1.3
France	21.0	22.1	1.1	18.1	19.1	1.0
The Netherlands	21.1	20.6	-0.5	18.9	18.4	-0.5

Source: AC Nielsen, 2000

Although private label growth has been strong in Europe in recent years, there are no signs that the pace will slow down. On the contrary, growth is still accelerating and is expected to outperform the retail sector as a whole in the coming years. Euromonitor forecasts a 26 per cent growth of all private label sales in Europe between 1997 and 2002. Growth of non-food private labels will outstrip those of food (58.2 percent compared to 7.3 percent). On the whole, private label will achieve a 13.9 percent share of all European retail sales by 2002. However, considerable differences exist between Northern and Southern Europe. In Northern Europe, where the supermarket structure is more or less fully developed and the trade is very concentrated, the share of private labels has pretty much stabilized. In some countries the share of private labels is even dropping, like the



Netherlands. Southern European countries are quickly catching up to the North.

The total share of private labels in a country depends on different factors. Wherever commercial concentration is developing, the share of the private label is growing. The assortment choices supermarket chains make also influence the total share of private labels in a country. Further on, the share of private labels is influenced by whether or not an A-brand is present in a certain market. Often, in a market where three large A-brand manufactures are dominant, retailers do not launch a private label concept.

The following trends will impact European private label products sales and innovation:

- Organic foods are going mainstream
- Convenience in the chilled sector is desired
- Short-life and high-margin food products are in
- Healthy and functional food sales are rising

Future prospects for private label foods are strong in the following categories:

- Functional foods (dairy, breakfast food, soft drinks, pet food)
- Organic and natural foods
- Convenience foods
- Full-fat, full-flavored foods
- Dietary supplements

In spite of the strong attraction of private label in Europe, growth potential can only be utilized when retailers offer a broad variety of good quality and innovative private label products. The key is to establish relationships with major supermarkets and develop products in cooperation with them. Retailers should also support their supermarket formula by powerful marketing campaigns and merchandizing.

### **Private Label in The Netherlands**

In 1999, private label sales in the Netherlands had an 18.4 percent market share in value, a decrease of 0.5 percent compared to the preceding year. Private labels account for one in five products sold. Yet while neighboring markets have witnessed dramatic expansion of private labels over the last few years, the sales in the Netherlands have been decreasing for the second year. This is partly due to the warm summer of 1999 which stimulated the sales of ice and soft drinks. In both product groups A-brands still have a strong market position. Besides, the flourishing Dutch economy encourages purchasing of (higher priced) A-brands as well. Advertising campaigns by competing supermarket chains also intensify the demand for A-brands. In addition, discounter Aldi has lost market share in the Netherlands. Approximately 85 percent of its range is made up of very inexpensive private labels. In some product areas (e.g., long shelf-life shelf milk) Aldi has even become a market leader. However, Albert Heijn is the overall market leader in private labels in the Netherlands. The department stores HEMA and Marks & Spencer only offer private labels in their food departments. The innovative private label approach of Marks & Spencer could be a model for other retailers.

According to Erasmus Food Management Institute (EFMI), the market share of private labels in the Netherlands is more favorable than mentioned above. In fact, not all of the fresh products are taken into account, while Dutch supermarkets have invested heavily in private labels for fresh food. For example, market leader Albert Heijn only sells its own AH-label meat and meat products, while supermarket chain Super De Boer offers pork under its Best-Meat label. SDB also sells its own apple brand "Tentation," while supermarket chain C1000 does the same with Roblos. EFMI gives three reasons for the fact that it is more interesting to conduct private



labels in fresh than in groceries:

- Lower competition by Name brands
- High gross margins
- More possibilities to establish a supermarket “cachet” to attract consumers

Only 30 percent of Dutch consumers say that they are more aware of private labels than a year ago. This is one of the lowest awareness rates in Europe. However, while market share has been slipping, the appetite for private label remains good. More than half of the customers say that they frequently buy the retailers’ brands. In addition, one in four consumers says that they are more likely to buy private labels than a year ago.

The perishable departments led private label performance in the Netherlands. Delicatessens had the highest value share, nearly 30 percent, while dairy posted the greatest volume share, almost 33 percent. According to GfK Information Resources approximately 61 percent of daily fresh milk and buttermilk sold in Dutch supermarkets are private-label. A further increase of this share is expected. Meals, eggs and biscuits also have private label shares of more than 50 percent. However, these value shares are decreasing.

According to MORI the private label market in the Netherlands shows significant signs of growth in the future, with consumers asking supermarkets to provide a wider variety of private label products, to introduce higher quality goods into the market and offer value for money.

<b>Private label market share by department in the Netherlands (%)</b>						
<b>Department</b>	<b>Volume</b>			<b>Value</b>		
	<b>1998</b>	<b>1999</b>	<b>Diff.</b>	<b>1998</b>	<b>1999</b>	<b>Diff.</b>
Dairy	31.8	32.1	0.3	27.5	27.2	-0.3
Frozen	24.7	24.5	-0.2	21.9	21.3	-0.6
Dry Grocery	20.5	19.9	-0.6	17.4	17.0	-0.4
Confectionary	15.3	15.2	-0.1	15.1	14.7	-0.4
Bakery and Biscuits	25.4	26.1	0.7	25.2	25.0	-0.2
Hot beverages	26.7	26.7	0.0	24.5	23.3	-1.2
Non-alcoholic beverages	15.0	13.6	-1.4	13.6	12.7	-0.9
Alcoholic beverages	19.6	17.0	-2.6	16.3	14.8	-1.5
Delicatessen	25.8	25.7	-0.1	28.8	29.5	0.7
Pet food	26.2	24.3	-1.9	23.4	21.6	-1.8
Tobacco	6.0	5.9	-0.1	5.0	4.9	-0.1
<b>TOTAL MARKET SHARE*</b>	<b>21.1</b>	<b>20.6</b>	<b>-0.5</b>	<b>18.9</b>	<b>18.4</b>	<b>-0.5</b>

Source: PLMA, 2000

Note: Total market share includes also the departments household, paper products, and health & beauty

Top product categories in the Netherlands in 1999 (%)			
Volume		Value	
Product	Market share	Product	Market share
Milk/Buttermilk	53.3	Chilled ready meals	53.0
Sherry/sherry-like beverages	46.7	Sherry/sherry-like beverages	49.0
Potato products	45.6	Milk/Buttermilk	48.9
Chilled ready meals	44.7	Peanuts/nuts etc.	41.4
Vegetables canned/jar	40.2	Dutch packaged cheese	39.6
Dutch packaged cheese	36.3	Apple sauce etc.	39.2
Port	35.5	Port	38.5
Advocaat	35.4	Potato products	37.4
Peanuts, nuts etc.	35.0	Advocaat	36.4
Ice cream	34.1	Cooked sausage ss	34.1
Curds	34.0	Vegetables canned/jar	33.3
Cooked sausage ss	33.8	Stock liquid	31.9

Source: PLMA, 2000

Gainers in market share in the Netherlands in 1999 (%)			
Volume		Value	
Product	Share	Product	Share
Sweeteners	9.1	Sweeteners	6.4
Fruit drinks	6.6	Vegetables, herbs	3.1
Snack bases	4.1	Chilled ready meals	2.5
Milk/Buttermilk	2.8	Oils	2.5
Chilled ready meals	2.6	Pasta	2.3
Peanuts, nuts etc.	2.5	Peanuts, nuts etc.	2.1
Dutch packaged cheese	2.5		

Source: PMLA, 2000

## EXPORTER BUSINESS TIPS

### General information

Due to the concentration of buying power in Europe U.S. manufacturers will have to consider supplying larger quantities, possibly private labels, and dealing with fewer buyers. The introduction of the EURO is likely to complicate this picture. On the one hand, regional, local differences in tastes and preferences can be expected to continue, in the Netherlands. On the other hand, prices may equalize through more controlled and sophisticated electronic purchasing and distribution system. To develop ties with European retailers, U.S. firms must have a warehouse and/or distribution facility in Europe to handle the small and frequent orders (stores are usually much smaller than in the U.S.). Securing that facility, of course, requires financial commitment to the market.

In Europe the U.S. enjoys a positive image in Europe, particularly among the younger generation. Although, the American colors (red, white and blue) are a draw and can help marketing and promotional efforts, they may also “color” consumer expectations. American foods do not always enjoy a “fine cooking” or “haute cuisine” reputation. In addition, American manufacturers may face some subtle or implied biases. Europeans are more disposed to buying their own products, believing them to be of higher quality than American foods.

### The Private Label Manufacturers Show

As of now, few American manufacturers have ventured systematically into the concentrated retail sector of Europe. And fewer have discovered the annual Private Label Manufacturer (PLMA) Show. The show has been held in Amsterdam for over a decade, and has grown into a significant, highly specialized show. PLMA restricts exhibitors to manufacturers and exclusive agents, and targets retailers/supermarket buyers as visitors. In 2000, the show has more than 2,700 exhibit stands representing manufactures from more than 50 countries. There were a few U.S. exhibitors, but American themes and tastes were notably present. The PLMA show is a good venue to find partners in the Netherlands, Belgium and Luxembourg provided your company:

- Has innovative/novel products that are price competitive
- Has sufficient capacity and flexibility to adapt a product to European tastes
- Is flexible enough to meet European distribution and financing requirements
- Has the ability to develop warehousing/distribution facilities or contacts

The PLMA show is organized by the Private Label Manufacturers Association

For more information on shows and private labels in general, please contact:

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## FOOD STANDARDS AND REGULATIONS

### Labeling Requirements

In general labeling must not be misleading. The following information must be on the label:

- The name of the product
- List of ingredients in descending order of weight
- Net quantity in metric units (suggested, not required)
- The date of minimum shelf life
- Special storage conditions or conditions of use
- The name of the “sender”
- Instructions for use (if necessary for appropriate use)

Many manufacturers also provide nutritional values on their packaging. This is obligatory when a nutritional claim is used on the label. There are specific, detailed regulations for all of the points made above. These regulations may differ from country to country within the EU and should be studied before finalizing packaging. All the information mentioned above must be given in the language or the languages of the region in which the product is to be sold.

### Other regulations

Besides labeling requirements, there are also regulations regarding inspection and sampling, food-additives, flavorings, pesticides and other contaminants, control and hygiene, radioactive contamination, products in contact with foodstuffs, provenance and origin and packaging and packaging waste. As mentioned before, these regulations are only partly harmonized within the EU. Most importers are well informed about these subjects.

### FAIRS

The Netherlands follows EU policy in regard to labeling and ingredient requirements. More detailed reports which specifically address labeling and ingredients requirements in respectively the Netherlands can be obtained from the FAS homepage: <http://www.fas.usda.gov>. The reports are entitled Food and Agricultural Import Regulations & Standards (FAIRS).

### Tariff Regulations and Requirements for US Exporters

The EU common customs tariff classification, import duty, VAT (value-added tax) and import certificates are an important but complex area for export into Europe. Import companies and transport companies with customs declaration facilities can assist you. For all regulations the tariff classification by HS (Harmonized System)-code (six digits) of products within the international Nomenclature is relevant. To determine the customs tariff for your product, please contact:

#### For the Netherlands:

Rotterdam Customs Office  
Attn. Mr. J.H.F. Blom  
Tel: +31 10 290 46 89  
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## KEY CONTACTS AND FURTHER INFORMATION

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### Short List of Importers of U.S. Foods in The Netherlands

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